# PX-0520A

Case Clip(s) Detailed Report Sunday, January 09, 2011, 1:33:45 PM 520-A

#### 0 W3301



#### Matias, Manuel D. (Vol. 01) - 03/10/2010

1 CLIP (RUNNING 00:21:45.400)



MMEDIT

🏥 Mr. Matias, could you tell us who ...

13

27 SEGMENTS (RUNNING 00:21:45.400)

```
2.2
                       Mr. Matias, could you tell us who
23
        your employer is?
24
                         Robert Wood Johnson University
25
        Hospital.
```

#### 2. PAGE 10:13 TO 11:08 (RUNNING 00:01:18.300)

1. PAGE 5:22 TO 5:25 (RUNNING 00:00:04.700)

```
What software does Robert Wood Johnson
     14
              currently use or license from Lawson Software?
     15
                       Α.
                              Right now we are currently using --
              I'm assuming you're speaking modules?
     16
                              Yes. Modules and applications or
     17
                       Q.
     18
              however it is you would refer to them.
                              Okay. Right now we're using what is
     19
                       Α.
     20
              called RSS, Requisitions Self-Service. It's where
     21
              the end user orders their supplies. We use the
     22
              inventory management tool. It's where all the
      23
              inventory's housed, storeroom, house stock. We
      2.4
              also use the general ledger, AP and budget module
      25
              and we also use a module called MSCM, and that's a
              module that we use to go up and bar count the units
00011:01
     02
              that have bar codes. It's a hand-held technology.
      ΛZ
                              Okay. And is inventory management,
                       Q.
      04
              is that the same as inventory control?
      05
                              Yes.
      06
                              Okay. And does Robert Wood Johnson
                       Ο.
     07
              also license Purchase Order?
      08
                              We use the PO module, yes.
```

#### 3. PAGE 11:09 TO 11:12 (RUNNING 00:00:08.000)

```
09
                        And does law -- excuse me. Start over.
10
                      Does Robert Wood Johnson license
11
        Procurement Punch-Out?
12
```

### 4. PAGE 11:13 TO 12:08 (RUNNING 00:01:14.900)

```
13
                        Does Robert Wood Johnson license
14
        Lawson's EDI software?
15
                 Α.
                        Yes. We do use EDI here.
16
                        Okay. Is there any other software
17
        modules or applications that you're aware of that
        Robert Wood Johnson licensed from Lawson?
18
19
                        Let's see what else. We use add-ins
2.0
        to extract and upload data but that's an Excel --
21
        you know, in conjunction with Excel.
                        Were these add-ins provided by
2.2
                 Ο.
23
        Lawson?
```

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|                  | 0_113301   |
|------------------|--|
|                  |  |
| 24               | A. Yes.  |
| 25               | O. So does Robert Wood Johnson license             |
| 00012:01         | the Microsoft add-ins from Lawson Software?        |
| 02               | A. Yes.  |
| 03               | Q. Okay. Thanks.                                   |
| 04               | Mr. Matias, do you know how long                   |
| 05               | Robert Wood Johnson has licensed Lawson's          |
| 06               | procurement software?                              |
| 07               | A. About four months now. We we went               |
| 08               | live November 1st.                                 |
| 5. PAGE 12:23 TO | 13:06 (RUNNING 00:00:20.400)                       |
| 23               | Q. Okay. When did the implementation               |
| 24               | begin for the Lawson procurement software?         |
| 25               | A. April? April of 2009.                           |
| 00013:01         | Q. April of 2009. Okay. Thank you.                 |
| 02               | So altogether the implementation took              |
| 03               | roughly let's see                                  |
| 04               | A. Six months.                                     |
| 05               | Q seven months?                                    |
| 06               | A. Seven months, yes.                              |
|                  |  |
| 6. PAGE 13:12 TO | 13:23 (RUNNING 00:00:29.400)                       |
| 12               | Q. Okay. Mr. Matias, are you familiar              |
| 13               | with the term Item Master?                         |
| 14               | A. Yes.  |
| 15               | Q. Could you explain what the Item                 |
| 16               | Master is?   |
| 17               | A. Sure. Item Master in Lawson is                  |
| 18               | called IC 11. It's where we house all of our       |
| 19               | inventory supplies whether it's stock or nonstock  |
| 20               | and that that is where the end user on the floor   |
| 21               | gets their information from. It houses the Lawson  |
| 22               | item number, the description, the unit of measure, |
| 23               | manufacture number.                                |
| 7. PAGE 14:20 TO | 15:09 (RUNNING 00:00:50.900)                       |
| 20               | Q. Okay. Thank you.                                |
| 21               | Do you know approximately how many                 |
| 22               | items are in the Item Master as implemented by     |
| 23               | Robert Wood Johnson?                               |
| 24               | A. Right now we have roughly 36,000                |
| 25               | items.   |
| 00015:01         | Q. And could you describe the types of             |
| 02               | products that are available in the Lawson          |
| 03               | procurement system?                                |
| 04               | A. Sure. We have everything from                   |
| 05               | implants to medical/surgical supplies to lab       |
| 06               | supplies to gastroenterologist supplies. We have   |
| 07               | all sorts of screws, bolts, bandages, gauzes, IV   |
| 08               | solutions, reagents, hip implants, stents,         |
| 09               | pacemakers, IC AICDs for the pacemakers.           |
| 8. PAGE 16:07 TO | 17:24 (RUNNING 00:02:12.600)                       |
| 07               | Q. What about things like medical gowns            |
| 08               | or gloves?   |
|                  | <b>3</b>   |

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| 09       | A. Gowns and gloves, yes, they're in                |
|----------|---|
| 10       | there.  |
| 11       | Q. Okay. Could you explain what types               |
| 12       | of data are included about the items that are in    |
| 13       | the Item Master?                                    |
| 14       | A. Sure. In the Item Master we take and             |
| 15       | put the description.                                |
| 16       | Lawson only has 30 characters for the               |
| 17       | Description field so we get creative and if it's a  |
| 18       | suture, you know, we start it with s-u-t and then   |
| 19       | try to fit it in all the dimensions, you know, six  |
| 20       | by whatever centimeters.                            |
| 21       | It contains the manufacture number so               |
| 22       | in case we ever call the vendor and we need to      |
| 23       | identify the item to them, we got to give them the  |
| 24       | manufacture number. It contains a unit of measure   |
| 25       | which is usually the unit of measure that is        |
| 00017:01 | stocked by us and the manufacturer and is usually   |
| 02       | the purchase unit measure so if it's a box, you     |
| 03       | know, we're buying it by the box. If it's an each,  |
| 04       | you know, we're issuing out by the each, we're      |
| 05       | buying by the box, that's all that the Item Master  |
| 06       | has.  |
| 07       | Q. Okay. And when someone let me                    |
| 08       | start over.   |
| 09       | If a requester wants to purchase a                  |
| 10       | particular item or put in a request for that item   |
| 11       | to be purchased would they base their choice of     |
| 12       | which item they need on that item description?      |
| 13       | A. There's a couple of ways that the                |
| 14       | requester could find the item.                      |
| 15       | There's a a screen called PO 15                     |
| 16       | and it's basically they're a template so            |
| 17       | whatever items they want to see when they log in we |
| 18       | put all those items under that template so they     |
| 19       | will only see that template. If the item's not in   |
| 20       | there, then in RSS, requisitional service, they     |
| 21       | could do the search option and search for a         |
| 22       | description, manufacture number, catalog number,    |
| 23       | you know, and then they go narrow, narrow the item  |
| 24       | and pick the one that they want.                    |

#### 9. PAGE 19:09 TO 20:06 (RUNNING 00:01:24.800)

| 0.9 | O Mr. Mating do you know how many                  |
|-----|--|
| 09  | Q. Mr. Matias, do you know how many                |
| 10  | vendors Robert Wood Johnson uses within the Lawson |
| 11  | procurement system?                                |
| 12  | A. My God. Right off the top of my head            |
| 13  | I'm going to say 3,000.                            |
| 14  | Q. And do you know who the largest five            |
| 15  | vendors are that Robert Wood Johnson uses?         |
| 16  | A. I know the number one is Owens Minor.           |
| 17  | Then you have Medtronic. Then you have Synthes     |
| 18  | Q. Sorry. Could you spell that?                    |
| 19  | A. S-y-n-t-h-e-s. And the other two not            |
| 20  | off the top of my head.                            |
| 21  | Q. Okay. So is it is the vendor                    |

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|                   | U_W33U1   |
|-------------------|---|
|                   |   |
| 00024:01          | Q. For paper clips. But you would have  |
| 02                | two vendor items associated with  |
| 03                | A. Right.   |
| 04                | Q that one item?  |
| 05                | A. Correct.   |
|                   |   |
| 12. PAGE 24:06 TO | 24:10 (RUNNING 00:00:11.500)  |
| 06                | Q. Okay. And when you did a search for  |
| 07                | the item the way I understand you explained it, you                                       |
| 08                | would only see the item pop up associated with one  |
| 09                | of the two vendors?   |
| 10                | A. The primary vendor, right.   |
| 42 BACE 24:44 TO  | 25.06 (PUNNING 00.00.56 000)  |
| 13. PAGE 24.11 10 | 25:06 (RUNNING 00:00:56.000)  |
| 11                | Q. The primary vendor. How is that  |
| 12                | primary vendor designated?  |
| 13                | A. In IC 12. When and I'll show you   |
| 14                | when we get into the system. There's a source   |
| 15                | button that you have to pick a vendor to the item.  |
| 16                | Q. Okay. And at what point would you be   |
| 17                | able to switch from that primary vendor to the  |
| 18                | A. Secondary.   |
| 19                | Q secondary vendor?   |
| 20                | A. In PO 13.3 you have a capability of  |
| 21                | marking one of the items as the default so whenever                                       |
| 22                | the PO gets created it automatically puts that  |
| 23                | vendor item number instead of the other one.  |
| 24                | Q. But could you also select a different  |
| 25                | vendor as you're building the requisition?  |
| 00025:01          | A. They are the end users are able to   |
| 02                | select a vendor. If they're building a requisition  |
| 03                | like from scratch, the item already does not exist  |
| 04                | in the Item Master but if it already exists in the  |
| 05                | Item Master they can't select another vendor. We  |
| 06                | have to change the PO before it goes out.   |
| 14. PAGE 25:07 TO | 25:10 (RUNNING 00:00:07.800)  |
| 0.7               | O Go thought no year for the recovered  |
| 07<br>08          | Q. So there's no way for the requester to select the secondary vendor as they're creating |
| 09                | the requisition?  |
| 10                | A. Correct.   |
| 10                | A. COITECT.   |
| 15. PAGE 25:18 TO | 26:20 (RUNNING 00:01:16.600)  |
| 18                | Q. How how does a requester go about  |
| 19                | finding product items in the Lawson procurement   |
| 20                | system?   |
| 21                | A. Okay. So the requester only has  |
| 22                | access to requisitions of service. You know, when   |
| 23                | they log in, all their information populates. You   |
| 24                | know, the accounting, you know, the cost center,  |
| 25                | where the supplies are going to get charged to.   |
| 00026:01          | They have a couple options.   |
| 02                | They go into their shopping list  |
| 03                | which is the PO 15 that's already created and if  |
| 04                | another Lawson number item, they just search for  |
| OF                | the Larger item number. If they don't have any  |

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the Lawson item number. If they don't have any

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| 06 | information, they go into another option that's the |
|----|---|
| 07 | search button and and it searches the entire        |
| 80 | Item Master. They could put in the Lawson number.   |
| 09 | They could put our old inventory number from our    |
| 10 | old system because we carry that over. They can     |
| 11 | put a manufacture number. A word. Let's say         |
| 12 | they're searching for gloves. You can put glove     |
| 13 | and everything that contains that word glove will   |
| 14 | come up and then they have to, you know, narrow the |
| 15 | search by picking up the one that they really want  |
| 16 | and that's how they search for an item.             |
| 17 | Q. Okay. And when you're talking about              |
| 18 | the requester performing this search would this all |
| 19 | be done within Requisition Self-Service?            |
| 20 | A. Yes.   |

#### 16. PAGE 28:12 TO 28:21 (RUNNING 00:00:28.000)

- Ο. Okay. So within Requisition 13 Self-Service could you tell me which of the search 14 functions that Robert Wood Johnson has available 15 for its requesters? It's just -- it's -- when you go into 17 the Requisition Self-Service at the top of the 18 button it has just the word search and you click on 19 search, another screen pops up with a little field 20 and you get to type in whatever information you 21 want to type in to search.
- 17. PAGE 29:03 TO 29:13 (RUNNING 00:00:18.900)
  - 03 Are you familiar with something 04 referred to as UNSPSC codes? 05 Α. Yes. 06 Does Robert Wood Johnson use UNSPSC Q. 07 codes? 08 Α. 09 So Robert Wood Johnson doesn't have Q. 10 any UNSPSC codes designated for the items --11 Α. Correct. 12 -- in the Item Master? Q. 13 Α. Correct.

#### 18. PAGE 29:20 TO 30:15 (RUNNING 00:00:50.000)

| 20       | Q. Are you familiar with the Advance               |
|----------|--|
| 21       | Search feature within the Requisition Self-Service |
| 22       | application?                                       |
| 23       | A. Yes.  |
| 24       | Q. And is that enabled on the Robert               |
| 25       | Wood Johnson implementation?                       |
| 00030:01 | A. Yes. And that's where the end user              |
| 02       | searches, you know, like I explained before, the   |
| 03       | items.   |
| 04       | Q. And could you explain how the Advance           |
| 05       | Search feature works?                              |
| 06       | A. Sure. When the end user logs into               |
| 07       | RSS, you know, all the their fields already        |
| 08       | populated. Then on the top, you know, you click on |

09

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advance search and that's where you type in the

```
10
               Lawson item number, the description, you know,
               glove, you know, the manufacture number and
       11
       12
               anything that contains -- whatever you typed in
       13
               there pops up on your screen and that's where you
       14
               have to, you know, pick the right item that you
       15
               want to order.
19. PAGE 32:17 TO 35:05 (RUNNING 00:03:15.300)
       17
                               Mr. Matias, can you briefly explain
       18
               how purchase orders are generated using Lawson's
       19
               procurement software?
       2.0
                        Α.
                               Mm'mm. Okay. So the purchase orders
       21
               are generated when the user goes into requisitions
       22
               of service, they find their item. You know, they
       23
               put their quantity in. They hit check-out. Our
       2.4
               buyers are instructed to pull down those orders at
       25
               ten o'clock in the morning and at 2:30 in the
               afternoon. They run what is called PO 100 so every
00033:01
       02
               requisition that's sitting out there puts it into a
       03
               PO and that's how it gets created.
       04
                               Okay. And how does that purchase
       05
               order actually get transmitted to Robert Wood
       06
               Johnson's vendors?
       07
                               Sure. So after the buyer runs PO
       08
               100, they get a report of all the POs that were
               created. They go in and verify the pricing and
       09
       10
               everything's correct. Once they're done, on the
       11
               top right-hand corner there's a release function.
       12
               You click release and depending on how we have it
       13
               set up in the back end, either EDI or fax or, you
               know, E-mail the system automatically knows how to
       14
       15
               send those POs out. You know, they have to run
       16
               another -- we have it set up to automatically run
       17
               another job called PO 120 that gathers all the POs
       18
               and then another job that's run, ED 501, if it's an
       19
               EDI and that's also scheduled to run and that's how
       20
               it goes out.
       21
                               So EDI is one of the options for
       22
               actually transmitting the purchase orders --
       23
                        Α.
                               Mm'mm.
       24
                               -- to the vendors?
       25
                             And do you know about what percentage
00034:01
               of purchase orders get transmitted by virtue of the
       02
               EDI?
       03
                               I'm going to say 75 percent.
                        Α.
       04
                               Okay. And does Robert Wood Johnson's
       05
               vendors provide information on whether the items
       06
               ordered in these purchase orders are actually in
       07
               inventory once the purchase order's transmitted?
       08
                               Rephrase that for me. Do you mean do
                        Α.
       09
               they give us acknowledgment if they received the
       10
               order and they have the item?
       11
                               Yes. Exactly.
                        Ο.
                             Do they provide any sort of
       12
       13
               information about the availability of the items --
```

10

11

12

Α.

# 0\_W3301

|                    | 0_113301   |
|--------------------|--|
|                    |  |
| 14                 | A. Yes.  |
| 15                 | Q in the purchase order?   |
| 16                 | A. Yes. We are contracted with this  |
| 17                 | company called Global Healthcare Exchange, GHX for                                   |
| 18                 | short, and anything that's EDI you know, the   |
| 19                 | vendor has to be a partner of GHX so whenever we                                     |
| 20                 | set up an EDI vendor we get the information from                                     |
| 21                 | GHX so when we transmit our POs, you know, it's                                      |
| 22                 | realtime. The buyer could log on log into that                                       |
| 23                 | portal of GHX and check the acknowledgment of the                                    |
| 24                 | vendor; it's on back order, you know, the price                                      |
| 25                 | changed, the unit of measure should be box instead                                   |
| 00035:01           | of each.   |
| 02                 | If it's a fax, then the buyers have a  |
| 03                 | common code that says please fax or acknowledge,                                     |
| 04                 | you know, to our office or E-mail me or  |
| 05                 | acknowledgment so we know that you got the PO.                                       |
| 20 PAGE 35:06 TO   | 35:19 (RUNNING 00:00:35.000)   |
| 20. 1 AGE 33.00 TO | 7 33.19 (INDIVINING 00.00.33.000)  |
| 06                 | Q. Okay. So could you explain what   |
| 07                 | GHX's role is  |
| 80                 | A. Sure.   |
| 09                 | Q in submitting the purchase orders?   |
| 10                 | A. GHX is like a a middleman   |
| 11                 | repository for for mostly all healthcare   |
| 12                 | facilities in the United States.   |
| 13                 | It's basically they're the ones  |
| 14                 | controlling like the partner set-up, you know, with                                  |
| 15                 | the vendor. They're the ones setting up all the ED                                   |
| 16                 | transactions and then they just feed us the  |
| 17                 | information to make it easier for us instead of                                      |
| 18                 | going to every single vendor to get their EDI  |
| 19                 | information.   |
| 21. PAGE 35:20 TC  | 36:05 (RUNNING 00:00:20.900)   |
| 20                 | O Olare Ga ann time Dahart Ward  |
| 21                 | Q. Okay. So any time Robert Wood  Johnson transmits a purchase order via EDI they're |
| 22                 |  |
|                    | actually sending it to GHX?  |
| 23<br>24           | A. X. And GHX sends it to the vendor.  O. I see. And then the vendor in return       |
| 25                 | Q. I see. And then the vendor in return would  |
| 00036:01           |  |
| 00030.01           | A. Send it Q send something back   |
|                    |  |
| 03                 |  |
| 04<br>05           | Q to GH  A and then we go look at it online.   |
| 03                 | A and then we go look at it online.  |
| 22. PAGE 36:06 TC  | 0 36:20 (RUNNING 00:00:41.900)   |
| 06                 | Q. Okay. Great. So if the vendor   |
| 07                 | provides information on the availability of items                                    |
| 08                 | A. Mm'mm.  |
| 09                 | Q how is that done?  |
|                    |  |

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but we just -- when we log into the Web site we just see our PO number and the lines that were in

the PO and if it's wrong it has a red line through

I don't know how they do it to GHX,